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Looking at the bigger picture: designing and facilitating action learning across boundaries

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ABSTRACT

Action learning is seen under many guises, being adapted into different contexts (Marsick and O'Neil [1999. "The Many Faces of Action Learning." *Management Learning* 30 (2): 159–176.]). This is especially true in higher education, due to the divergent requirements and challenges of multiple action learning programmes and stakeholders within Liverpool Business School. We embed action learning with our DBA, MBA and bespoke leadership development programmes to support and enhance learning, development and workplace practices. Additionally, we use action learning to support knowledge transfer with industry and business growth activities with SMEs. In this account of practice, two action learning practitioners and advocates came together to share their experiences and practices of action learning. In doing so, a need for a Community of Practice (CoP) emerged. CoPs refer to groups of people who share a passion about a topic and who deepen their knowledge and expertise by interacting on an ongoing basis. CoPs recognise knowledge-based social structures and groupings of people who interact around their practices. In developing an action learning CoP, we can learn from each other's successes, challenges and even failures, with the aim of developing a supportive and collaborative learning system. This is true of action learning and communities of practice.

Introduction

This account tells the story of what emerged when two action learning practitioners and advocates came together to share their experiences and practices of action learning within their unique contexts, and in doing so, the need for a Community of Practice (CoP) emerged. The account begins by describing the contextual background of our practice and sets out our understanding of action learning and its purpose within executive education and research. We describe how action learning is used within Liverpool Business School to support and enhance learning, development and workplace practices. Our reflections, insights and lessons are then presented. Finally, this account explores the need for a CoP and its potential to provide an environment in which action learning

professionals can share their practice experiences, challenges and discuss areas of interest and build a sense of community. We hope this community will engage, support and share working practices across boundaries for the purpose of improving the professional practice of action learning facilitators.

Context

Our programmes are designed to support mature professional students, the majority of whom are working as senior business executives; therefore, we refer to our students as scholarly practitioners. The programmes invariably invite individuals to engage in changing professional practice and innovation in their workplaces across all areas of management, leadership and the functions of business. The programmes are modular in design, delivered in blocks focused upon improving management, leadership and inquiry-based practices, and additionally, they are asked to conduct primary research project grounded within their workplace. Students on the programmes (face-to-face and virtually) come together to learn together in cohort modules, but spend large periods focusing on their own individual learning. Our programmes are more about becoming a scholarly practitioner, than merely doing research or acquiring knowledge.

Action learning

We have adopted action learning as a collaborative approach to enable change and learning through taking action. We see action learning as supporting change in individual and wider management practice. Instead of focusing on merely programmed knowledge, which is often a preferred methodology in higher education (Brook and Pedler 2020), action learning focuses on questioning real-world issues to enable practical change. Action learning, rather than focusing on problems that have a clear answer, explores those wicked problems that are more complex to solve.

Action learning synthesises and extend this opportunity for practitioners to learn from and with each other (Willis 2004). Enabling them to reflect upon action and model behaviour can extend more broadly into their organisation. Action learning offers a safe space to challenge and support each other, listen and ask questions, which we feel are important skills for emerging scholarly practitioners.

Although at the core we hold true to Revans' Gold Standards of action learning, through necessity and evolution we have adapted our approach to action learning (Brook, Lawless, and Sanyal 2021). A departure from Revans' suggestion of homogenous groups, action learning sets on the programmes consist of students from multiple disciplines, levels of experiences and countries, but are united by the experience or learning on the programmes. We believe that this offers the opportunity for insightful questioning through valuing multiple perspectives (Willis 2004).

Action learning in Liverpool Business School

As scholarly practitioners, they use their expertise as a starting point for their learning. Students are encouraged to engage with their workplace context and research, reflect upon their own practice and how this may change as a consequence of their learning.

In addition, students are asked to look beyond their own personal development to the professional environment in which they are a part of.

At the centre of our philosophy is the notion that we learn best from experience, apply our learning and reflect together; therefore, action learning is a key part of our programmes. This approach encourages strong peer learning and networking, recognising that learning and skill development is a social and collaborative process. Through action learning, our students become scholarly practitioners developing critical inquiry skills by taking part in collaborative questioning, evaluating problems from multiple perspectives and giving and receiving feedback. Students are undertaking courses and development, facing problems which have 'a significant risk of a penalty for failure' (Revans 1998, 8). Therefore, action learning provides a safe environment to explore and challenge learning together in support of their courses.

The primary expectation of introducing action learning was to support social learning opportunities, encouraging the development of reflection, questioning and critical inquiry skills, providing a supportive space where issues and challenges from the workplace can be discussed. We have found that action learning facilitates the engagement with professional development and advances wider change within workplaces. Whilst some programmes adopt a facilitated approach to action learning, other programmes use a self-facilitated approach by action learning mentors. There is also a mixture of face-to-face and virtual action learning sets.

Our current role

We see our role as educators, researchers, facilitators and advocates of action learning to help individuals and organisations maximise learning, professional practice and transformation. We are both designers and facilitators of action learning within and outside of the University and are active members of action learning sets ourselves, which continues to inform our practice giving us insight into the power action learning has for our own learning.

Facilitated action learning sets

Hannah facilitates action learning sets within the Doctorate of Business Administration (DBA), the longest running professional doctorate in the university. We have adopted the ethos of learning together learning apart (Wilson et al. 2021), where action learning provides our distance learning practitioner opportunities to come together to develop their personal and professional learning. Action learning has been incorporated into the DBA since the beginning, with the focus on reflective practice, personal development and wicked organisational problems tackled through practice research action learning has existed to facilitate these practices. Although the focus of the DBA is a complex work-based problem, DBA research is far more than just undertaking a research, but about becoming a researcher. It is about personal and professional development, which is facilitated through the lens of research. Action learning supports the development of skills to navigate the complex work-based problems explored in the DBA research.

Action learning sets on the DBA are facilitated with sets meeting every 4–6 weeks. Like the DBA, the sets have individuals from a range of sectors and cultures. This requires

understanding and sensitivity to the nature of action learning. With issues of resourcing, a group of facilitators is being developed; however, it is important that the experience is similar, although adapted, for different sets.

Self-facilitated action learning sets

Natalie facilitates, designs and supports self-facilitated action learning sets within the Masters in Business Administration (MBA) and bespoke senior leadership programmes. Action learning is used as an effective strategy to develop leadership capability, taking learning from the main programme into effective action to respond to work-based leadership issues, challenges and opportunities. She also adopts action learning to support knowledge transfer and business growth within SMEs and within an academic setting supporting academic writers and groups struggling with remote working.

The leadership programmes adopt a self-facilitated approach to action learning to replace the need for an external facilitator, as the Action Learnings set lifespan runs for the duration of the programme from 6 months to 3 years. The intention of the self-facilitated action learning sets was to encourage members to actively experience the role of being a set member as well as a facilitator, as each role emphasises different skills. When designing and setting up self-facilitated action learning sets within a larger leadership development programme, a critical role is to provide members with training on the essence and principles of action learning and how action learning supports their programme of learning. At the start of the programme, each action learning set is supported by an experienced action learning facilitator, referred to as a mentor. As mentors, we provide training on active listening skills, questioning skills, critical reflection, giving and receiving feedback, group dynamics, the importance of psychological safety and action learning facilitation.

Emerging themes from sharing practice

As mentioned, we both facilitate action learning sets, but have realised we do this in isolation. Through a general conversation, the authors realised they had a shared interest in Action Learning, however, rarely have the opportunity to discuss their practice. From our conversation, a number of themes emerged as we discussed the complexity of our context and approaches. It was beneficial to hear the direct experience of another facilitator, what works for them or what has not.

Emerging purpose of action learning sets

In sharing our practice, one theme that we discussed repeatedly was how we experienced differing levels of receptiveness to action learning. Whilst many seem familiar with some form of action learning, the clarity of its purpose and outcomes within education and business still appears to need refining. With action learning's refusal to be defined (Brook, Lawless, and Sanyal 2021), as well as its inherent flexibility and adaptability, which we only see as a benefit, it can be difficult to communicate its purpose. This reflects the ideographic methodology (Brook and Pedler 2020). However, this is in juxtaposition to the views of organisational and educational stakeholders who require clear

learning objectives and course structure. Often, we found there is a request to know what happens in the set. Yet, we experience that the purpose, behaviour and outcomes of action learning emerge from the unique interactions of the set.

We spent time reflecting upon the emergent nature of action learning and the possibility of a fear of the mysteries of what is involved in action learning by outsiders (Brook and Pedler 2020). Although as advocates of action learning, we felt that this should be embraced and sets this methodological approach apart from other teaching methods, and we reflected on how we could reposition the notion of action learning to others. We considered ways of demonstrating the advantages of action learning. Specifically, how to highlight the flexibility of action learning to allow for responsiveness to changing context, the development of skills useful for scholarly practitioners or as ways to still connect virtually, for example when face-to-face teaching is more complex.

An evolving approach

Another factor we identified was as is inherent with action learning, a flexible approach is taken to our sets. Centred on questioning, we adapt our action learning sets to meet the needs of the set at each given time. We found that action learning cannot be a one-size-fits-all approach due to the changing needs and direction of sets. The ability to interpret the needs of the set within the local context (Pedler and Abbott 2008) and to adapt them is important. We have found that at different times, with different sets we need to take different approaches to both the design and facilitation. However, this requires skill and confidence from the facilitator to recognise the needs of different sets, and exploring the complexity of this with each other was instrumental to developing our practice.

There are many different approaches and ways the 'ethos' of action learning can be used and applied within action learning sets, but also in our wider daily practice as educators and practitioners. However, without the opportunity of exploring with others, we often tend to continue with old practices. Coming together from different backgrounds, we have questioned our own practice to find solutions to problems we had been struggling with. Often we have found that merely having conversations have strengthened our resolve for the approach we are taking, given us the confidence to implement them. Therefore, coming together between sets and having the opportunity to reflect and resolve issues have been beneficial to meet the evolving needs of sets.

Reflections

The process of sharing and reflecting upon our experiences for this account of practice has provided a useful opportunity for us to reflect and think together, learning more about the divergent requirements and challenges of action learning programmes across Liverpool Business School. In doing so, we gained access to learning opportunities and discovered new ways of working.

We reflected on the position of facilitation as being entangled with issues of initiation, different approaches, methods, set issues and competencies, to name a few. Facilitators require skilled hands to manage and engage the set. Ideally, facilitators should model set behaviour; however, this is often a difficult position to take and pass on (Pedler and

Abbott 2008). According to Revans, sets should develop their capacity to self-facilitate over time, as they develop their skills together as a set.

The time we have spent together is reflecting and sharing our practice providing opportunities to become self-aware, critique current practice and discovered new ways of working. However, we have found that taking action is challenging, as we work in silos due to our organisational structure. We reflected further by considering how other facilitators, including our own students maybe encountering similar difficulties. We believe that we need to go beyond sharing our own practice and recognise the importance of coming together as active participants to improve professional practice. We see activities such as mentoring, masterclasses and practitioner debates as a critical element of building a trusting action learning community that comes together to improve their professional practice.

Insights

As we shared knowledge, practice, challenges and opportunities, a concept of a community of practice emerged. The idea of CoPs coined by Jean Lave and Etienne Wenger can be found in a range of literature from around 1991. Put simply, CoPs refer to groups of people who share a concern, a set of problems or a passion about a topic and who deepen their knowledge and expertise by interacting on an ongoing basis (Wenger, McDermott, and Snyder 2002). CoPs recognise knowledge-based social structures and groupings of people who interact around their practices, with the aim of improving building a supportive and collaborative cross-institutional network.

We are seeking to apply a CoP as an approach to improve our action learning knowledge, expertise and enhance our own personal development. Additionally, we proposed that designing a CoP as a social learning system would help connect our cross-organisational teams, overcome our silo working, develop professional relationships and foster better appreciation for how others work.

We reflect and learn better when we reflect and learn together, each of us benefits from collaboration and participation within the community. We learn from each other's successes, challenges and even failures. This is true of action learning and communities of practice. Our next steps are to formalise an Action Learning Community of Practice. We hope this community will engage, support and share working practices across boundaries for the purpose of improving professional practice, enhancing shared learning and tacit knowledge of our action learning students, educators and practitioners. CoPs can foster a supportive environment through regular face-to-face collaborative spaces within the community, buddy systems (with one or two other people), observation opportunities and mentoring schemes.

A significant role within every CoP is community coordinators. As CoP coordinators, we seek to promote and coordinate learning-oriented events, both online and face-to-face, to learn from best practices and disseminate promising practices within our action learning community of practice.

Disclosure statement

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Notes on contributors

Dr Natalie Marguet is a Senior Lecturer in Executive Education at the School of Leadership and Organisation Development, Liverpool John Moores University. Natalie received her PhD investigating Organisation Decision—making from a personal construct perspective in 2017 from Manchester Business School. She leads several modules, including Scholarly Business Practice, Applied Business Research and Strategic Business Consultancy Project. She is also the Action Learning Coordinator for the School. Her research weaves together Systems Thinking, reflective practice, and coaching to enhance professional practice and personal growth.

Hannah Wilson is a Senior Lecturer in Research Methods in Business in the School of Doctoral Management Studies and works as part of the DBA team. Hannah's teaching is informed by the principles of action learning where she is passionate about collaborative action and learning. Her expertise spans, pedagogy, action learning, workplace strategy, research methods and work psychology, specifically, wellbeing, sense of community and belonging. These are fundamentally related to adaptations that can be made to improve individuals experiences and health within the work environment.

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